



MARKETING



TEN TIPS FOR A SUCCESSFULLY VIRTUALIZED ANNUAL MEETING

1. Prepare:

- Start laying the groundwork well in advance
- Review regulatory and compliance requirements
- Adopt any necessary bylaws to allow for a virtual meeting

2. Strategize:

- Consider if now is the time to try something new
- Decide on a strategy (Should this be a high engagement experience or a satisfaction of obligation? Is this an opportunity to reach a different group of members?)

3. Plan:

- Define in advance who is presenting and what's on the agenda
 - o Assign topics
 - o Determine batting order
 - o Schedule practice
- Determine video logistics (How it will be used, which platform will you use, who will be visible, when video is on, etc.)

4. RSVP:

- Invite your members
 - o Inform them of any upcoming votes or other information that they should be aware of in advance of the meeting
 - o Ensure any needed credentials or materials are provided well in advance
- Create a system for RSVP tracking

5. Promote:

- Incentivize attendance to ensure quorum
- Promote attendance to current and prospective members

6. Digitize:

- Leverage tools to engage members remotely (Zoom, PPT, IDP, etc.)
 - o Encourage attendees to use chat window or survey tools to make meeting more interactive
- Prepare a PowerPoint or PDF for meeting visualizations
- Consider preparing your Annual Report as an **Interactive Digital Publication** that can be emailed to members or posted to your website following the presentation
 - o ex: Dirigo **Annual Report**, OTIS **Annual Meeting**, and Maine Savings: **Owners Guide**

7. Develop:

- Create materials, agenda, presentation, and/or workflow to adhere to, so your team is coordinated
- Leverage any past meeting materials that are relevant

8. Perfect:

- Practice, practice, practice! Rehearse transitions and review use of computers, video, microphones, connections, etc.
- Identify how the flow of motions to accept reports, minutes, and votes will be conducted

9. Host:

- Expect the unexpected. Something will happen unexpectedly—roll with the punches and have a backup plan in case technical difficulties arise
- Connect with your membership. Make it fun—tell the membership why it is exciting to belong to your credit union!

10. Share:

- Post a copy of your recorded video to your website
- Email your members with link to your video and annual report, along with a thank you for attending